SENIORS' HOUSING REPORT
Atlantic

CANADA MORTGAGE AND HOUSING CORPORATION

Date Released: 2018

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Highlights

Newfoundland

The total number of spaces in Newfoundland increased 2%[1] in 2018 to 3,772 and 41% of these were standard spaces, where residents receive less than 1.5 hours of care per day. There were significantly more spaces in higher price ranges. The proportion of standard spaces offering rents higher than $2,500 increased from 40% to 49%. Meanwhile, the average rent for standard spaces increased by 3% to $2,781. The vacancy rate for standard spaces was the highest in Atlantic Canada, increasing by 2 basis points to 20%.

New Brunswick

There were 3,924 total spaces in New Brunswick, of which 54% were standard spaces. The number of standard spaces was virtually unchanged whereas the number of residents increased 19% in 2018 compared to 2017. With demand increasing faster than supply, the vacancy rate for standard spaces decreased 1.3 points to 9.3%.

Nova Scotia

With 1,624 total spaces, Nova Scotia has the second lowest number of spaces in Atlantic Canada. However, 75% of these are standard spaces, the highest proportion in the region. The vacancy rate for standard spaces, the lowest in the region, decreased 0.4 points to 6.2%. One-bedroom units, which account for 58% of total spaces, had the highest average rent of $3,265 among all units. This was a 1% decrease from 2017.

Prince Edward Island

There were 1,306 total seniors' residence spaces in PEI after an increase of 3% from the previous year. Bachelor or studio units were the most dominant in the market, constituting 42% of total spaces. While the number of residents increased at the same rate (3%) as supply of spaces, the vacancy rate increased to 8.4% in 2018. The average rent for all standard spaces increased 6% to $3,270 largely due to a 16% increase in rents for one-bedroom units.

[1] Senior Housing stats might be influenced by the varying programs, subsidies and incentives offered in each of the Atlantic Provinces.

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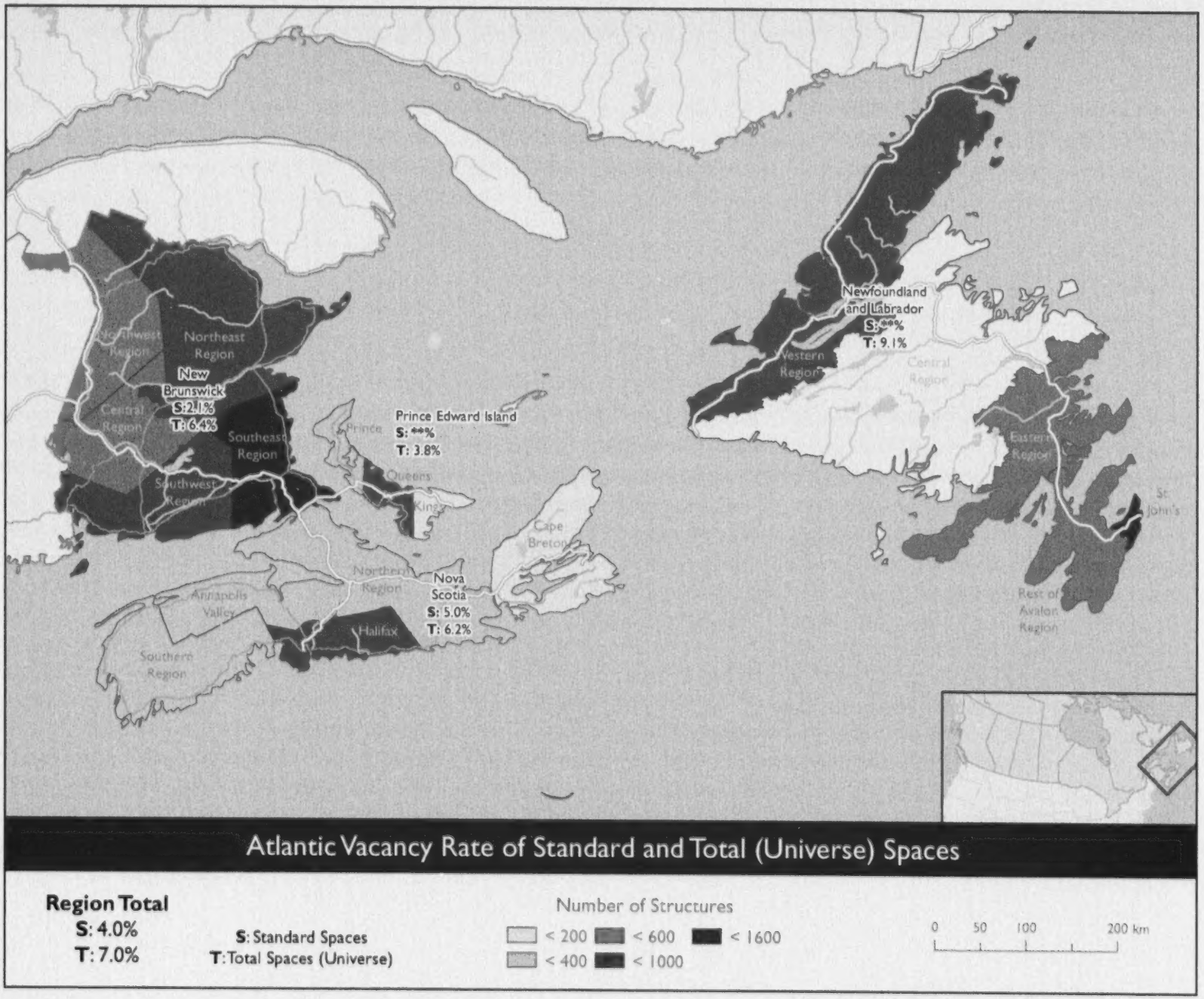
Northeast Region
New Brunswick
S: 2.1%
T: 6.4%
Southeast Region
Southwest Region
Central Region
Prince Edward Island
S: **%
T: 3.8%
Prince
Queens
Kings
Cape Breton
Northern Region
Nova Scotia
S: 5.0%
T: 6.2%
Annapolis Valley
Halifax
Southern Region
Newfoundland and Labrador
S: **%
T: 9.1%
Western Region
Central Region
Eastern Region
St. John's
Rest of Avalon Region
Atlantic Vacancy Rate of Standard and Total (Universe) Spaces
Region Total
S: 4.0%
T: 7.0%
S: Standard Spaces
T: Total Spaces (Universe)
Number of Structures
< 200
< 400
< 600
< 1000
< 1600
0 50 100 200 km

TABLES INCLUDED IN THE ATLANTIC REGION SENIORS' HOUSING REPORT

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1.1 Vacancy Rates (%) of Standard Spaces by Unit Type
Atlantic Region

Province	Ward/Semi-Private		Bachelor		One Bedroom		Two Bedroom +		Total	
	2017	2018	2017	2018	2017	2018	2017	2018	2017	2018
Newfoundland and Labrador	41.7	36.7	10.5	9.0	4.9	7.4	**	**	17.8	20.0
Prince Edward Island	15.6	23.3	6.2	5.4	1.8	5.2	**	**	7.1	8.4
Nova Scotia	52.0	42.9	10.6	6.0	4.3	6.1	8.7	5.0	6.6	6.2
New Brunswick	34.1	9.1	11.3	14.9	9.1	4.9	10.3	2.1	10.6	9.3
Atlantic Region	**36.7**	**29.7**	**9.9**	**11.4**	**6.1**	**5.9**	**8.5**	**4.0**	**11.4**	**11.4**

The following units are excluded from the table above: non-market/subsidy units, respite units, and units where an extra charge is paid for Heavy-care (1½ hours or more of care).

1.2 Vacancy Rates (%) of Standard Spaces by Rent Range ($)
Atlantic Region

Province	Less than $2,000		$2,000 - $2,499		$2,500 - $2,999		$3,000 - $3,499		$3,500 and More		Total Where Rents are Known	
	2017	2018	2017	2018	2017	2018	2017	2018	2017	2018	2017	2018
Newfoundland and Labrador	**	**	29.4	34.7	4.9	8.6	**	1.1	2.9	**	19.2	20.2
Prince Edward Island	**	**	8.8	10.9	1.9	12.3	**	2.7	7.0	5.6	7.1	8.4
Nova Scotia	7.2	5.8	7.7	4.5	5.0	10.6	10.2	9.3	5.8	2.9	6.6	6.2
New Brunswick	8.1	2.3	8.6	15.1	5.1	9.8	12.4	14.5	32.6	28.5	10.6	9.6
Atlantic Region	**7.9**	**3.0**	**18.3**	**22.9**	**4.9**	**9.9**	**8.7**	**8.3**	**9.9**	**7.7**	**11.7**	**11.6**

The following units are excluded from the table above: non-market/subsidy units, respite units, and units where an extra charge is paid for Heavy-care (1½ hours or more of care). Second person extra charge is also excluded from the calculation.

The following letter codes are used to indicate the reliability of the estimates:

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1.4 Universe, Number of Residents Living in Universe and Capture Rate (%)
Atlantic Region

Province	Total Number of Spaces	Overall Vacancy Rate (%)		Number of Residences	Number of Residents	Estimated Population Aged 75+[1]	Capture Rate[2] (%)
		2017	2018				
Newfoundland and Labrador	**3,772**	**9.4**	**9.1**	**72**	**3,495**	**39,098**	**8.9**
Avalon Region	1,639	6.5	7.9	32	1,551		
Central & Eastern Region	1,432	12.5	9.6	26	1,311		
Labrador & Western Region	701	9.3	10.9	14	633		
Prince Edward Island	**1,306**	**3.7**	**3.8**	**32**	**1,279**	**11,251**	**11.4**
Kings & Prince County	438	4.0	4.6	12	425		
Queens	868	3.6	3.3	20	854		
Nova Scotia	**1,624**	**6.2**	**6.2**	**41**	**1,657**	**76,694**	**2.2**
Halifax	690	3.0	3.7	10	**		
Northern Region & Cape Breton	407	6.9	4.5	11	414		
Southern Region and Annapolis	527	9.7	10.8	20	521		
New Brunswick	**3,924**	**6.6**	**6.4**	**75**	**3,860**	**63,072**	**6.1**
Northwest, Northeast and Centr	1,544	7.5	7.1	36	1,471		
Southwest & Southeast Region	2,380	6.0	5.9	39	**		
Atlantic Region	**10,626**	**7.2**	**7.0**	**220**	**10,291**	**190,115**	**5.4**

[1] Source: Statistics Canada. Table 051-0001 - Estimates of population, by age group and sex for July 1, Canada, provinces and territories, annual (persons unless otherwise noted) (accessed: March 09, 2017).

[2] The capture rate is the proportion of the population aged 75 and over living in the survey universe.

2.1 Universe of Total Spaces by Unit Type
Atlantic Region

Province	Ward/Semi Private	Bachelor/Studio	One Bedroom	Two Bedroom +	Total
Newfoundland and Labrador	1,814	502	1,420	36	3,772
Prince Edward Island	470	550	258	28	1,306
Nova Scotia	58	416	942	208	1,624
New Brunswick	343	1,795	1,604	182	3,924
Atlantic Region	**2,685**	**3,263**	**4,224**	**454**	**10,626**

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2.2 Universe by Unit Type
Atlantic Region

Province	Ward/Semi Private	Bachelor/ Studio	One Bedroom	Two Bedroom +	Total
Newfoundland and Labrador	**1,814**	**502**	**1,420**	**36**	**3,772**
Standard Spaces	639	211	663	34	1,547
Non-Standard Spaces	987	243	588	2	1,820
Unknown Spaces	188	48	169	-	405
Prince Edward Island	**470**	**550**	**258**	**28**	**1,306**
Standard Spaces	107	316	134	27	584
Non-Standard Spaces	363	222	124	1	710
Unknown Spaces	-	12	-	-	12
Nova Scotia	**58**	**416**	**942**	**208**	**1,624**
Standard Spaces	14	204	811	187	1,216
Non-Standard Spaces	42	67	6	-	115
Unknown Spaces	2	145	125	21	293
New Brunswick	**343**	**1,795**	**1,604**	**182**	**3,924**
Standard Spaces	205	833	984	95	2,117
Non-Standard Spaces	106	784	269	7	1,166
Unknown Spaces	32	178	351	80	641
Atlantic Region	**2,685**	**3,263**	**4,224**	**454**	**10,626**
Standard Spaces	965	1,564	2,592	343	5,464
Non-Standard Spaces	1,498	1,316	987	10	3,811
Unknown Spaces	222	383	645	101	1,351

2.3 Universe of Standard Spaces and Rent Range ($)
Atlantic Region

Province	Less than $2,000	$2,000 - $2,499	$2,500 - $2,999	$3,000 - $3,499	$3,500 +
	% of Total[1]	% of Total[1]	% of Total[1]	% of Total[1]	% of Total[1]
Newfoundland and Labrador	**	50.7 a	22.5 a	11.2 a	15.6 a
Prince Edward Island	**	28.5 a	24.9 a	13.1 a	33.6 a
Nova Scotia	18.6 a	9.2 a	15.5 a	22.5 a	34.1 a
New Brunswick	47.6 a	28.8 a	6.5 a	9.7 a	7.4 a
Atlantic Region	**23.2 a**	**30.0 a**	**14.8 a**	**13.5 a**	**18.6 a**

[1] % is based on those spaces where the rent is known.

The following units are excluded from the table above: non-market/subsidy units, respite units, and units where an extra charge is paid for Heavy-care (1½ hours or more of care).

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2.4 Proportion (%) of Structures where Select Services are Available[1] by Structure Size Atlantic Region

Province	Meals				On-Site Medical Services	On-Site Nursing Services[2]	24-Hour Call Bell	Pharmacy
	Optional	# of Meals Included in Rent						
		1	2	3				
Newfoundland and Labrador	**0.0**	**1.5**	**0.0**	**98.5**	**28.2 d**	**9.0 c**	**79.2**	**4.4**
10 - 49	0.0	0.0	0.0	100.0	25.6 d	8.7 c	63.0	5.6
50 - 89	0.0	0.0	0.0	100.0	25.0 d	4.2 d	95.9	4.2
90 or more	**	**	**	87.7	**	**	100.0	**
Prince Edward Island	**0.0**	**0.0**	**3.1**	**96.9**	**54.5 a**	**45.1 a**	**96.9**	**0.0**
10 - 49	0.0	0.0	4.4	95.6	44.9 a	**	95.6	0.0
50 - 89	**	**	**	100.0	**	**	100.0	**
90 or more	**	**	**	**	**	**	**	**
Nova Scotia	**0.0**	**9.8**	**	**	**66.3 a**	**	**90.2**	**
10 - 49	0.0	7.5	**	**	**	**	88.7	**
50 - 89	**	**	**	**	84.4 a	**	84.4	**
90 or more	**	**	**	**	87.5 a	**	100.0	**
New Brunswick	**4.8**	**	**2.7**	**85.3**	**	**	**90.7**	**15.1**
10 - 49	0.0	0.0	0.0	100.0	**	20.4 d	92.7	9.4
50 - 89	**	**	4.9	**	73.9 a	**	88.7	19.7
90 or more	**	**	12.0	**	**	**	**	**
Atlantic Region	**1.6**	**4.7**	**5.8**	**87.8**	**46.9 a**	**26.9 a**	**87.7**	**8.4**
10 - 49	0.0	1.5	5.1	93.4	38.9 a	16.7 d	84.0	7.9
50 - 89	3.8	**	1.7	85.6	53.6 a	**	92.7	8.5
90 or more	**	11.5	**	**	71.5 a	**	95.1	11.2

[1] Services are considered to be included in rent for a structure if the majority of all spaces have the service included in the rent.

[2] On-site nursing services include RN, RPN or LPN.

The following letter codes are used to indicate the reliability of the estimates:

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2.5 Proportion (%) of Structures with Access to Selected Amenities[1] by Structure Size Atlantic Region

Province	Transport-ation Services	Swimming Pool	Hot Tub/Spa	Movie Theatre	Exercise Facilities	Internet
Newfoundland and Labrador	**85.4** a	**0.0** b	**3.0** c	**10.4** a	**20.8** c	**77.6** a
10 - 49	86.1 a	0.0 b	5.7 c	8.8 c	14.4 c	65.7 a
50 - 89	87.7 a	0.0 b	0.0 b	0.0 b	**	87.6 a
90 or more	75.3 a	**	**	**	**	100.0 a
Prince Edward Island	**50.9** a	**0.0** b	**0.0** c	**9.4** a	**38.8** a	**87.5** a
10 - 49	53.8 a	0.0 c	0.0 c	13.3 a	23.4 d	82.3 a
50 - 89	**	**	**	**	**	100.0 a
90 or more	**	**	**	**	**	**
Nova Scotia	**67.8** a	**0.0** b	**	**	**	**83.4** a
10 - 49	**	0.0 b	**	**	**	74.4 a
50 - 89	**	**	**	**	**	100.0 a
90 or more	100.0 a	**	**	100.0 a	100.0 a	100.0 a
New Brunswick	**75.0** a	**	**	**67.5** a	**	**91.0** a
10 - 49	73.3 a	0.0 b	2.2 a	**	**	85.4 a
50 - 89	73.9 a	**	**	94.8 a	85.2 a	100.0 a
90 or more	87.4 a	12.0 c	**	75.4 a	88.0 a	100.0 a
Atlantic Region	**73.6** a	**	**9.3** c	**39.7** a	**37.6** a	**84.7** a
10 - 49	71.6 a	0.0 b	4.2 c	34.2 a	23.6 d	77.1 a
50 - 89	73.1 a	**	**	**	49.7 a	94.6 a
90 or more	84.5 a	3.7 b	18.6 d	68.9 a	80.3 a	100.0 a

[1] Services are considered to be included in rent for a structure if the majority of all spaces have the service included in the rent.

3.1 Average Rent ($) of Standard Spaces by Unit Type Atlantic Region

Province	Ward/Semi-Private		Bachelor		One Bedroom		Two Bedroom +		Total	
	2017	2018	2017	2018	2017	2018	2017	2018	2017	2018
Newfoundland and Labrador	2,296 a	2,394 a	2,761 a	2,772 a	2,895 a	3,069 a	**	**	2,706 a	2,781 a
Prince Edward Island	2,313 a	2,409 a	3,432 a	3,339 a	2,762 a	3,210 a	**	**	3,088 a	3,270 a
Nova Scotia	2,942 a	2,837 a	2,864 a	2,946 a	3,291 a	3,265 a	2,844 b	3,078 a	3,156 a	3,181 a
New Brunswick	2,497 a	1,951 a	2,297 a	2,274 a	2,160 a	1,613 a	3,257 a	1,400 b	2,294 a	1,901 a
Atlantic Region	**2,334** a	**2,327** a	**2,707** a	**2,617** a	**2,740** a	**2,583** a	**3,305** a	**3,022** a	**2,718** a	**2,579** a

The following units are excluded from the table above: non-market/subsidy units, respite units, and units where an extra charge is paid for Heavy-care (1½ hours or more of care).

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Methodology

Canada Mortgage and Housing Corporation conducts the Seniors' Housing Survey in February and March. This annual survey became national in scope in 2009, covering all centres in each of the ten provinces. Both private and non-profit residences are included in the survey universe.

To be eligible for inclusion in the survey results, a residence must:

- ✓ have at least one unit that is not subsidized (in the Atlantic provinces, Quebec and Ontario);
- ✓ have been in operation for at least one year (for example, it must have started operation before January 2015 to be included in the 2016 survey);
- ✓ have at least 10 rental units (in Quebec, Ontario and the Prairies) or 5 rental units (in the Atlantic provinces and B.C.);
- ✓ offer an on-site meal plan;
- ✓ not mandate high levels of health care (defined as 1.5 hours or more of care per day) to all of its residents; nursing homes and long-term care homes are examples of residences that were not included in the survey;
- ✓ offer rental units; life lease units and owner-occupied units are excluded from this survey; and
- ✓ have at least 50 per cent of its residents who are 65 years of age or older.

The Seniors' Housing Survey is a census and not a sample survey; therefore, all seniors' residences in Canada meeting these criteria are to be part of this survey. The survey universe in Quebec may include private residences that do not meet the conditions for obtaining a certificate of compliance.

Survey data were obtained through a combination of telephone interviews and fax and e-mail responses. Information was obtained from the residence owner, manager or administrator. Survey results reflect market conditions at the time of the survey. Survey results have been weighted to adjust for non-responses, in order to ensure that they are reflective of the universe. The level of statistical reliability is noted in the data tables. For more information on the reliability of the data, please click here.

All statistics published, excluding information on new market supply, include only those residences that have been in operation for at least one year.

Definitions

Space: A space is a residential area that is rented out. Examples of spaces include one half of a semi-private unit, a private or bachelor unit, a one-bedroom unit and a two-bedroom unit. In most cases, a space is the same as a unit. The exception is the case where a unit has been divided to rent to multiple residents. Semi-private and ward units are an example of this. Unless otherwise indicated, data for spaces are for all unit types.

Standard space: A space where the resident does not receive high-level care (that is, the resident receives less than 1.5 hours of care per day) or is not required to pay an extra amount to receive high-level care. Regional terms for this type of space may vary across the country.

Heavy care space: A space where the resident is paying an extra amount to receive high-level care (1.5 hours or more of care per day). Examples of conditions that could require high-level care include Alzheimer's, dementia and reduced mobility.

Respite space: A space used to provide temporary accommodation for a senior who normally lives in another place and not at the residence.

Non-market or subsidy space: A space where the rent received for the unit is less than market rent or where the resident occupying the unit is subsidized.

Rent: The actual amount a resident pays per month for his or her accommodation space and all mandatory services. For vacant spaces, the rent is the amount the owner is asking for the space.

Vacancy: A space is considered vacant if, at the time of the survey, it is physically unoccupied and available for immediate rental.

Capture rate: The main age group living in seniors' residences are persons aged 75 years and older. Capture rate in a centre is the ratio of the total number of residents living in the survey universe divided by its estimated 75+ population, expressed as a percentage.

Acknowledgement
The Seniors' Housing Survey could not have been conducted without the co-operation of the residence owners and their staff. CMHC acknowledges their time and assistance in providing accurate information. As a result of their contribution, CMHC is able to provide data and analysis that benefits the entire industry.

Confidentiality
All information provide through this survey is kept strictly confidential and only used by CMHC to generate statistics and data sets that do not allow for the identification of individuals, households, businesses or buildings.

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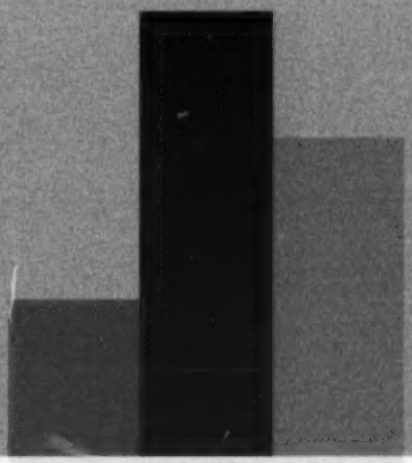

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